

## Bond Michelle D

---

**From:** Lemons Terry L  
**Sent:** Friday, November 02, 2018 11:12 AM  
**To:** Tim Hugo; Corbin Kenneth C  
**Cc:** Fox Diane - ATSC; Vickie Hull  
**Subject:** RE: Draft Free File press release  
**Attachments:** FFA Press Release 11-1-18 4 pm version (002).docx

Tim – here are some edits and one comment from us. We’re awaiting one final approval, but we’re hoping/aiming for a 1 p.m. release today ( chance we could slip to 130). Is that workable on your end?

We’ll let you know as soon as we have a green light.

Thanks.

**From:** Tim Hugo [mailto:tim.hugo@capnet.org]  
**Sent:** Thursday, November 01, 2018 4:10 PM  
**To:** Corbin Kenneth C ; Lemons Terry L  
**Cc:** Fox Diane - ATSC ; Vickie Hull ; Tim Hugo  
**Subject:** Draft Free File press release

Ken and Terry,

Attached is the Free File draft press release which will go out AFTER the IRS press release goes pubic.

Many thanks for all of your efforts on behalf of the American Taxpayers.

Tim

--

**TimHugo**

(b) (6)

**Washington, DC ---** Today, the Free File Alliance (FFA), in conjunction with the Internal Revenue Service (IRS), announced new consumer friendly improvements to their joint partnership tax preparation program that has served more than 53 million Americans since its inception in 2002.

This new agreement means that the 12 Free File companies that currently participate in the Program will provide new options that make the Program easier to use and more consumer friendly to the American taxpayers. [Click here for the IRS press release on the new agreement.](#)

Free File Alliance Executive Director Tim Hugo stated: "Over the sixteen-year life of this joint public-private partnership Program, we have worked with the IRS to continually improve Free File. The Service and our group have come up with a series of improvements to better serve taxpayers. Today, we are pleased to announce the latest round of improvements that will benefit the taxpayers who use this program. We are also grateful to Commissioner Rettig for his leadership on this issue at the beginning of his term of service."

Working together, the Free File Alliance and the IRS will implement new features for the upcoming 2019 tax preparation season to make it easier and more attractive for taxpayers to access these programs when they start at [IRS.gov/freefile](https://www.irs.gov/freefile), or when they return to the Free File company they filed through last year. New, consumer friendly features will include:

**Returning Free File customers will be routed to Free File.** If a previous year Free File customer comes back to a Free File member the following year, that taxpayer will *first* be provided the option to return to the Free File Member's Free File website. Again, the FFA seeks to ensure that its prior year customers are provided a free federal return.

**If a customer does not qualify for an individual company Free File offer, they will be provided a clear first option to return to the original IRS Free File landing page to find another free offer.** This option will include the Free File Alliance Fillable Forms program or another free option that the company might offer under the \$66,000 income cap. Again, the intent of the Free File Alliance is to match an individual taxpayer with a company that can provide them a free return.

**The elimination of the Value-Added Button on individual company sites' Free File Landing Page.** This button allowed consumers in prior years to access other, non-Free File commercial offers. By eliminating this button, the focus will remain on the Free File service.

**Reinforcing the Program Review.** The Free File Alliance and the IRS annually review the individual FFA companies' compliance with the overarching program rules in the agreement that protect the taxpayers. We will reinforce current practices and require in season third-party, independent reviews. These additional reviews will ensure that the taxpayer has a great product to receive a free return whether he or she files early in January or April 15<sup>th</sup>.

**Millions of emails will remind past customers to again use Free File.** Individual Free File companies will be required to email prior year users to remind them about the current free return options available at Free File ([IRS.gov/freefile](https://www.irs.gov/freefile)). These new, Free File advertising emails may not contain any solicitation for any other non-FFA product or service.

Deleted:

Commented [FD-A1]: They say 'clear first option to return to landing page', then include a second option that the company may give a free return outside of Free File

Deleted: n

Deleted: y

Hugo concluded, "While Free File has served over 53 million customers and saved these taxpayers no less than \$1.6 billion dollars, with these new changes we hope to better serve even more Americans with this free, safe, and easy to use product."

*Beginning in January 2019, the Free File Alliance will again host two main products that can serve taxpayers of all income groups. First, the Free File Alliance will once again begin offering free federal returns to taxpayers earning up to \$66,000. With built-in logic and prompting questions from the software, these programs are equivalent to the top of the line software found anywhere in the world. Each company implements its own criteria, but, on the IRS.gov/freefile page there is always a program for everyone making up to \$66,000 including every active duty military personnel with an income that does not exceed \$66,000. Lastly, many Free File Alliance companies work with the states to also provide free state returns.*

*Second, the Free File Alliance also provides a product -- with no income limit -- known as the Free File Fillable Forms (FFFF). Free File Fillable Forms is to be considered the electronic equivalent of paper and is best used by those who normally fill out their taxes by hand and have a greater familiarity with the tax code.*

###